User Manual: Manager

1. RallyPoint User Types

Members

Members comprise of any cardholder that belongs to an organization. Members may include but are not limited to employees, clients, vendors, Board of Directors; investors' even immediate family if requested. In general, members have a much smaller role than any other user type with regard to the amount of complexity required to run the system. Members have the following capabilities:

- Check-in
- Manage Member Profile
- Send, Receive and Reply to Corporate Messaging
- Receive Corporate Data, such as Documents, Pictures and Video

Departmental Managers

Departmental managers are basic members that also manage a group or several groups of people. Generally you can define departmental managers directly from your organization chart. Every member is directly linked to his/her departmental manager. Departmental managers have the following capabilities:

- Check-in
- Manage Member Profile
- Manage Employee Profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events
- Send & Receive Corporate Messaging
- Setup & Maintain Trusted Communication with Clients, Vendors and Media
- Manage Facilities
- View Reports

Facility Mangers

Facility managers are basic members that manage a physical facility/location. Facility managers are tasked with the responsibility to evacuate members located in their facility. Every member should be assigned to a facility manager. Facility managers have the following capabilities:

- Check-in
- Manage Member Profile
- Manage Employee Profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events

- Send & Receive Corporate Messaging
- Setup & Maintain Trusted Communication with Clients, Vendors and Media
- Manage Facilities
- View Reports

System Administrators

System administrators are basic members that also have complete system access. Facility managers are often the people in an organization responsible for setting up and maintaining the RallyPoint system. System administrators have the following capabilities.

- Create Communications Tree
- Create Facility Tree
- Manage Skills
- Manage Members
- Manage Company Information
- Manage employee profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events
- Send & Receive Corporate Messaging (requires rights)
- Setup & Maintain Trusted Communication with Clients, Vendors and Media
- Manage Facilities

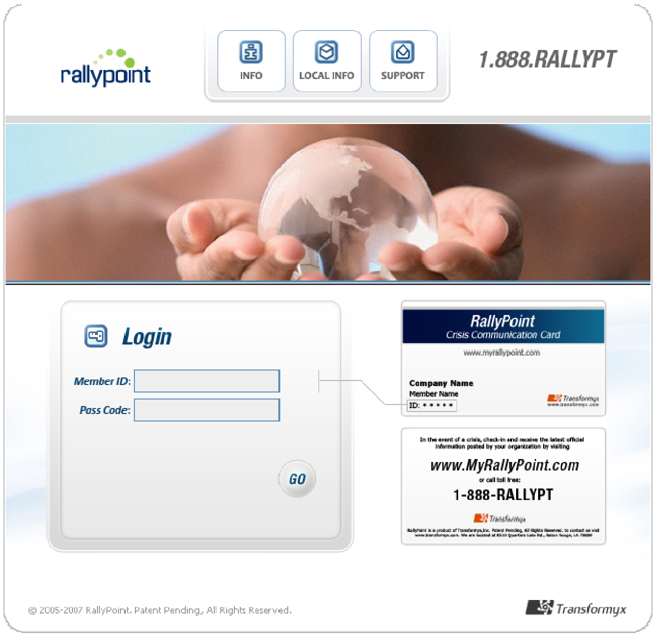
Getting Started

2. How to Access your RallyPoint Account

Your organization cares about its people and has implemented RallyPoint into its emergency preparedness and recovery plan. In the event of an emergency, you will receive an alert via text message and/or email. Using your RallyPoint Crisis Communication Card, you are able to check in with your manager(s), receive vital recovery information, and deliver messages informing your manager of your status and location.

Using your RallyPoint Crisis Communication Card

Your RallyPoint member card contains login information for Online and Phone Access:



2.1 Online Access

To access your RallyPoint account, first open an Internet browser and type into the address bar www.myrallypoint.com.

2.2 Phone Access

To access your RallyPoint account, from any working phone, dial **1-888-RALLYPT (1-888-725-5978).**

Your initial login information for Online & Phone Access:

Member Id:
This can be found on your RallyPoint issued member card.

Pass Code: ****
The pass code can be any 4 numbers you choose.
We recommend that you use the last 4 digits in your social security number, however it is not required.

2.3 Phone Check In and Usage for a Manager

To access your RallyPoint account, from any working phone, dial **1-888-RALLYPT (1-888-725-5978).**

Once you dial the number, you will hear the voice attendant and will be asked to provide some information to verify your identity.

Press 1 for a payphone
Press 2 for any other phone

Enter your **Member Id:** xxx*xxxxxxxx

This can be found on your RallyPoint issued member card.

Pass Code: ****
The pass code can be any 4 numbers you choose.
We recommend that you use the last 4 digits in your social security number, however it is not required.

Once verified you will then hear the **Company** message as well as your **Manager** message.

Press 1 to leave a check-in message for your manager
Press 2 to leave an announcement message for your direct reports
Press 3 to hear your check in messages from your members
Press 7 to leave a global company message

2.4 Record a check-in message for your manager

Press 1 to record your 60 second ***check-in*** message
Press 9 to disconnect

To record a check-in message you will be prompted to enter your current location 5 digit zip code. RallyPoint can geo-code your current location on a map for your management team to view.

Enter the ***zip code*** and then ***press #***.

RallyPoint will then prompt you to decide if you can return to work.

Press 1 if Yes
Press 2 if No

After this, you will be asked if you would like to record a voice message for your check in. You will have 60 seconds to record this message, press # when you are finished.

Press 1 to review your message
Press 2 to re-record your message
Press 3 to deliver the message

Once you deliver your check-in message, you will be asked what other messages you would like to leave.

Press 1 for your direct reports
Press 2 to leave a Global Company Message
Press 7 to disconnect

2.5 Leave an announcement for your members

RallyPoint will give you 60 seconds to record this message. Press # when you are finished.

Press 1 to review your message
Press 2 to re record your message
Press 3 to deliver the message to your direct reports

2.6 Listen to your members check-in messages

Remember that only new check in messages will be heard from this option. You will hear the first message on the IVR. After listening to your message, you can:

Press 1 to repeat the message
Press 2 for the next message
Press 3 to return to main menu

2.7 Leave a global company message

You will have 60 seconds to record a company-wide message, press pound when you are finished.

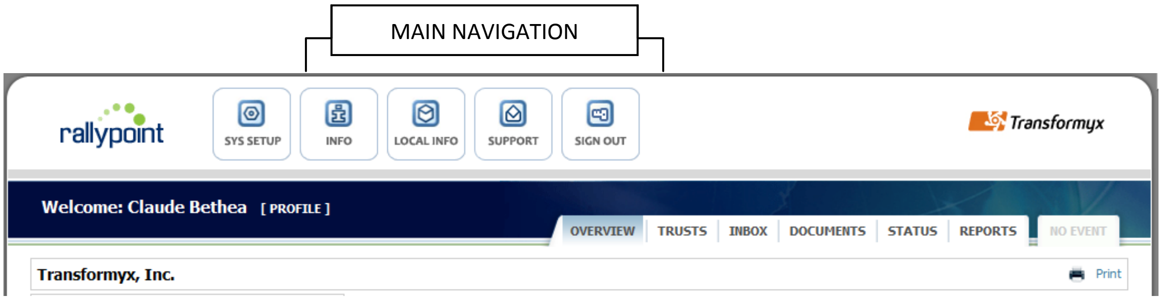
Press 1 to review your message
Press 2 to re record your message
Press 3 to deliver a global company message if you have rights

> As a manager, you can also hear all of your member check in messages via the website at www.myrallypoint.com

3. Navigating RallyPoint

RallyPoint is an extremely sophisticated and powerful system, but it was created with the end user in mind. Any employee can easily learn to navigate the basic features of the system in only a few minutes.

3.1 Main Navigation

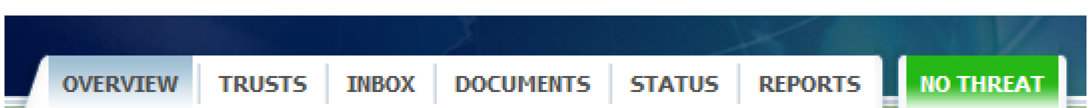


System Setup is only accessible by system administrators. Click the SYS SETUP icon in the main nav. This is the section where the company's communication & facility structures are setup and managed. The tabs in this section include:

SYS SETUP	This option only appears for System Users and allows access to the System Setup menus.
INFO	The **INFO** icon will open a new window, bringing the user to www.myrallypoint.net where he/she can learn more about the features and capabilities of RallyPoint.
LOCAL INFO	Clicking the **INFO** icon allows the users to view RallyPoint features, unique characteristics, current threats via news feeds and a contact form.
SUPPORT	By clicking the **SUPPORT** icon, the user has access to a contact form along with a comment box. A toll-free contact number to speak to a RallyPoint representative is also provided.
SIGN OUT	The user signs out of the system by simply clicking the **SIGN OUT** icon.

3.1 Manager Tabs

RallyPoint has built in intelligence that will display the most relevant information to the user and his associated rights. The basic members will see a different opening screen based on event status and last time the user logged in. The initial login will require the user to update his/her profile unless an event has been declared. If an event has been declared the first screen will be the member Check-In. This will require the member to check in before continuing. If an event has been declared and the member has checked in his/her Inbox will be the opening screen to allow the member quick access to the latest company and manger messaging.



OVERVIEW	The Overview screen gives managers an overview of the company's statistics, communications tree, facility tree direct report managers and members.

TRUSTS	The Trusts screen is the Online Business Directory. Here the "trusts" are established and maintained between clients and vendors.
INBOX	The Inbox is where the user sends, receives, stores, composes and broadcasts messages.
DOCUMENTS	The Documents allows users to upload, store and share critical documents.
STATUS	The Status section is where the manager checks members in and out, sets the company status, and manages events.
REPORTS	The Reports Screen allows the user to view real time status reports of the status of the company. Messages can be sent directly from the graphs. Several reports are available including the graphical view of available assets, Member Roster Report, Outbound Efficiency Report and an Interval Check-in.

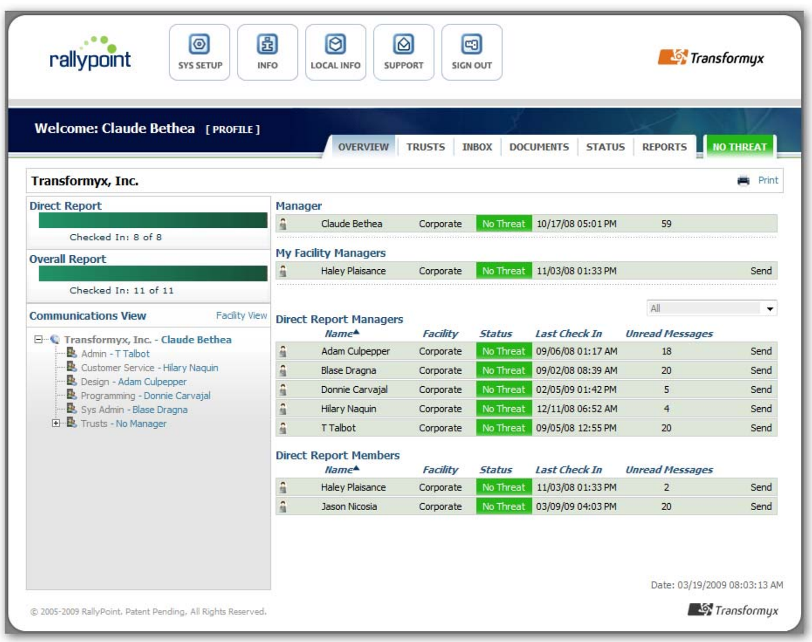
Emergency Contact – the emergency contact is the person the member should contact in case of an emergency. This person's information can be found in the left of the Main Toolbar under the welcome note.

Emergency Status – The emergency status is the status of each facility during an event. The Emergency Status can have one of six values. Below are the values that are available.

NO EVENT	Status used when there is not a current event or possible event.
NO THREAT	Status used when there is an event but a threat is not imminent.
ALERT	Status used when there is an event and a threat is likely.
EVACUATE	Status used when there is an event and you need to evacuate your employees.
RECOVERY	Status used when there is an event and you are past the initial impact.
RETURN	Status used when there is an event and you are past the recovery phase and entering into the return to work phase. Return is used as a general call to all employees to return.

4. OVERVIEW

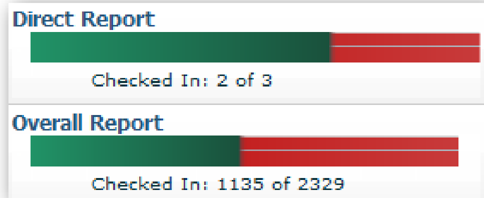
The Overview screen gives managers an overview of the company's statistics, communications tree, facility tree direct report managers and members. Management tools including Statistics, Communication View, Facility View, member and manager information will be demonstrated in this section.



Statistics

There are 2 line graphs at the top left of the screen. These graphs represent the current check-in status of all the members that directly and indirectly report to this manager.

Direct Report – Report of those members who directly report to you.
Overall Report – Report of those members who directly and indirectly report to you.

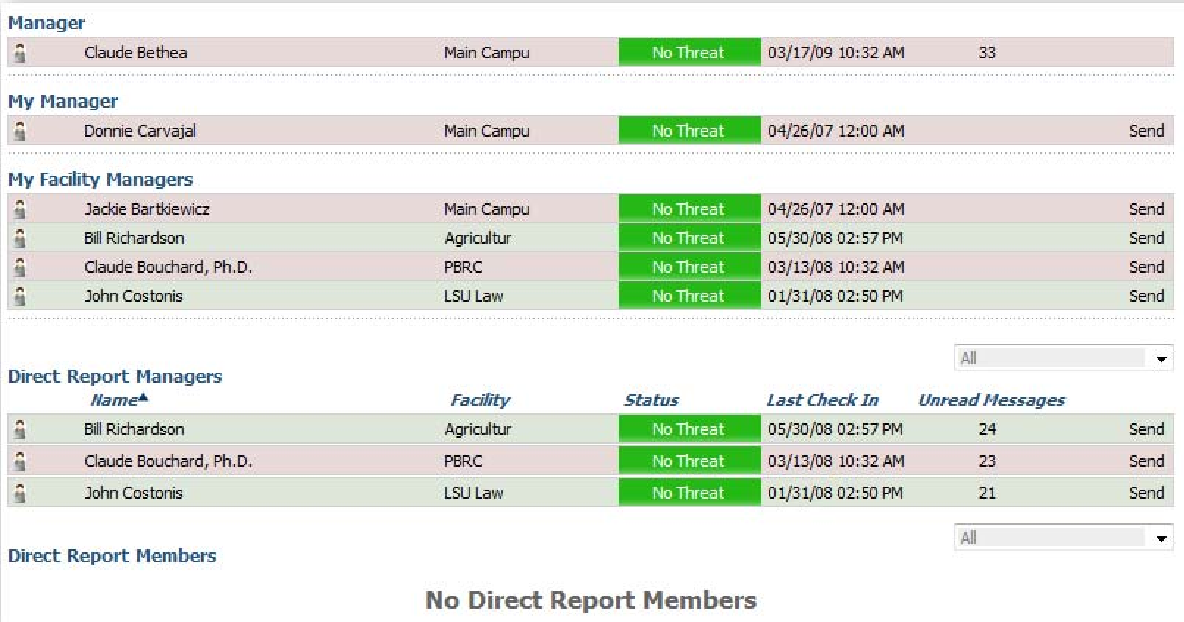


Communications Tree

The “Company Tree” on the left will display your current organizational structure. Organizational structures are built during the initial implementation and are unlimited in their flexibility. The department level is displayed in grey text and the manager of that department is displayed in blue. Click through the tree to view the details associated with each level.

Communication Tree Report

The overview information shown to the right of the communication tree corresponds with the tree level selected. The following information is displayed:



Manager

Claude Bethea	Main Campu	No Threat	03/17/09 10:32 AM	33	

My Manager

Donnie Carvajal	Main Campu	No Threat	04/26/07 12:00 AM		Send

My Facility Managers

Jackie Bartkiewicz	Main Campu	No Threat	04/26/07 12:00 AM		Send
Bill Richardson	Agricultur	No Threat	05/30/08 02:57 PM		Send
Claude Bouchard, Ph.D.	PBRC	No Threat	03/13/08 10:32 AM		Send
John Costonis	LSU Law	No Threat	01/31/08 02:50 PM		Send

All

Direct Report Managers

Name	Facility	Status	Last Check In	Unread Messages	
Bill Richardson	Agricultur	No Threat	05/30/08 02:57 PM	24	Send
Claude Bouchard, Ph.D.	PBRC	No Threat	03/13/08 10:32 AM	23	Send
John Costonis	LSU Law	No Threat	01/31/08 02:50 PM	21	Send

All

Direct Report Members

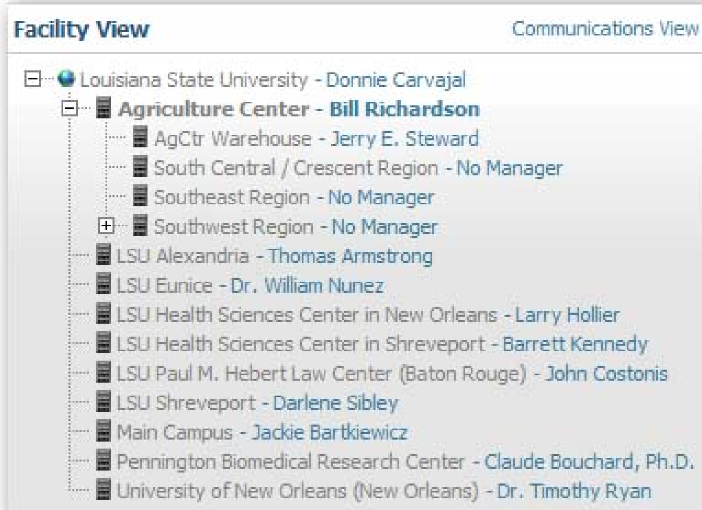
No Direct Report Members

Manager	This field displays the name of the manager selected in the communications tree.
My Manager	This field displays the name of the manager's manager selected
My Facility Managers	This field displays the facility managers who report to the selected manager
Direct Report Managers	This field displays the managers who directly report to the manager selected
Direct Report Members	This filed displays the members who directly report to the manager selected

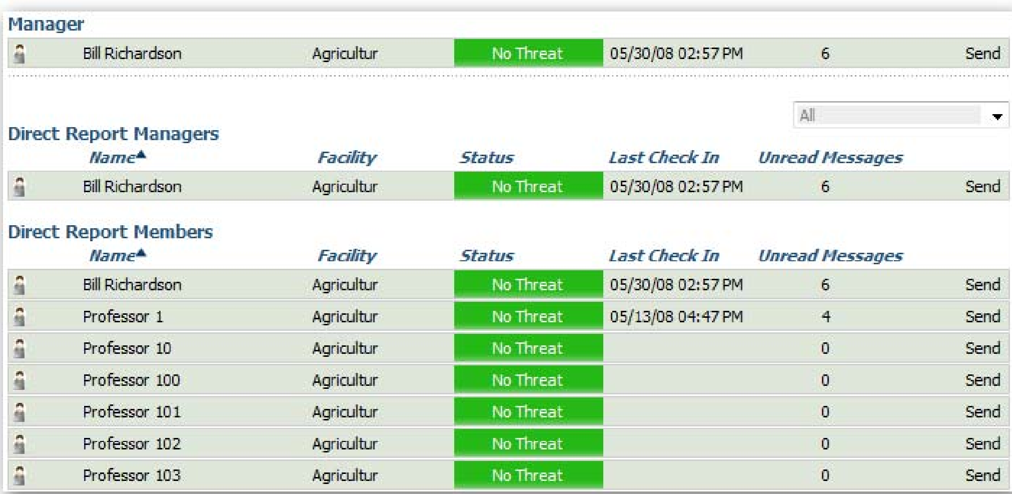
The facility the member belongs to is displayed to the right of the member's name along with the status of that facility. The background color displays red if the member is checked out and green if checked in. the date and time of the member's last check in is shown to the right of the facility status. The number of unread messages in the member's inbox is displayed. Click on this number to navigate to that user's inbox and respond on his/her behalf. A "Send" link is displayed to the far right. This allows you to send a message directly to that member.

Facility Tree

Click on "Facility View" to view the details associated with each facility. The facility name is displayed in grey and the manager of that facility in blue. Click on the facility to view the details associated with each.



When a facility is selected, the manager of that facility is displayed under the field marked "Manager". The facility name and status is shown to the right of the member's name. The background is green if that member is checked in and red if checked out. The number of unread messages is shown to the right. Select the number and you will be taken to that member's inbox where you can now respond to messages on his/her behalf. Click the "Send" link to send a message directly to the member from this report.



Manager

Bill Richardson	Agricultur	No Threat	05/30/08 02:57 PM	6	Send

All

Direct Report Managers

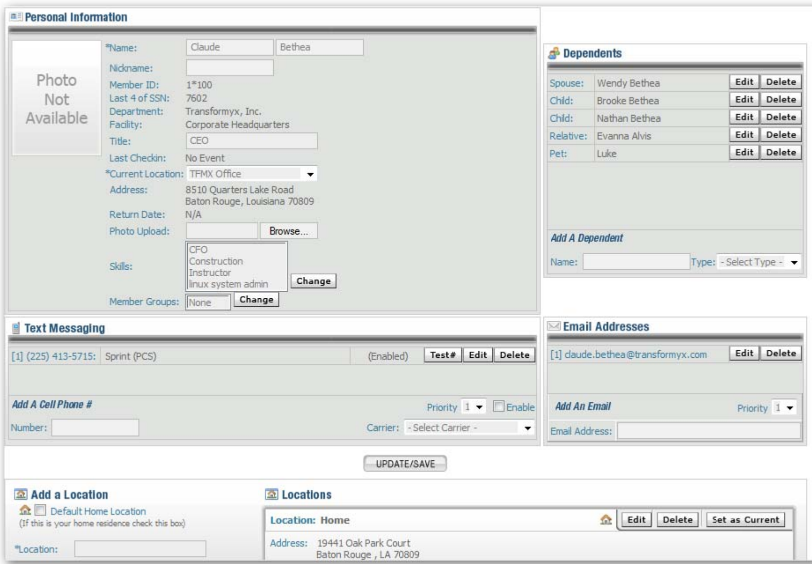
Name	Facility	Status	Last Check In	Unread Messages	
Bill Richardson	Agricultur	No Threat	05/30/08 02:57 PM	6	Send

Direct Report Members

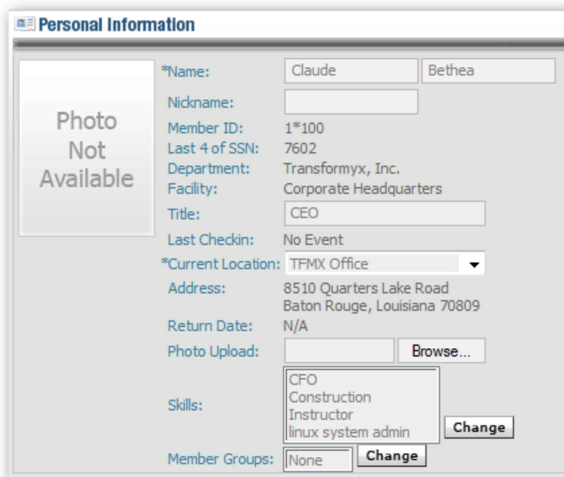
Name	Facility	Status	Last Check In	Unread Messages	
Bill Richardson	Agricultur	No Threat	05/30/08 02:57 PM	6	Send
Professor 1	Agricultur	No Threat	05/13/08 04:47 PM	4	Send
Professor 10	Agricultur	No Threat		0	Send
Professor 100	Agricultur	No Threat		0	Send
Professor 101	Agricultur	No Threat		0	Send
Professor 102	Agricultur	No Threat		0	Send
Professor 103	Agricultur	No Threat		0	Send

4.1 PROFILE

The Member Profile is the section in the application that contains each member's critical contact, location and dependent data. The profile of a manager can be found by clicking "PROFILE" next to the username in the welcome note. Member profiles can be uploaded in bulk in the system setup for easy implementation. Be sure to add your primary "Contact Information". This is the place to add your primary phone and email address.

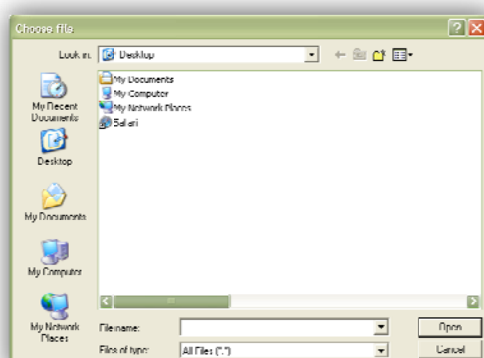


4.1.1 Adding/Updating Personal Information



Adding/Updating personal information – You may notice your profile has pre-loaded information in it. This is the information that was likely pre-loaded from a data import from your organization's human resources program. Be sure to update your information in the member profile. Click Update/Save to save any changes.

Adding/Updating current location – within the "Personal Information" section members can change their current location by simply clicking on the Current Location dropdown and clicking Update/Save to save the changes. The "Current Location" is used to define the exact location of an employee. If you move from one place to another be sure to update your "Current Location", this information is used by RallyPoint to map your location graphically on our interactive mapping tool.



Uploading a photo – To upload a photo click on the Browse... button located in the personal information section of the member profile. When the Choose File dialogue box pops up browse through your files and choose the image that you would like to upload and click Open. Be sure to use an image that is around 100 x130

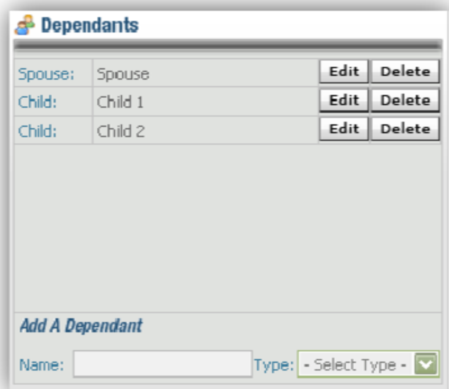
pixels in size. Larger images can be used but will only display 100x130.

Deleting a photo – To delete a photo select the Delete Photo checkbox and click  to remove the image.

Adding/Updating Skills

To update member skills click  and the Skills and Crafts selection box will appear. Select the appropriate skills and crafts or add a new skill or craft and click . Note: Not all members will have the rights to add a new skill or craft. See your system administrator if you need these rights added to your member *profile.*

4.1.2 Adding/Updating Dependents



Adding Dependents

Adding dependents will give your manager insight about additional responsibilities you may have to manage during a crisis. To add a dependent, go to the “Dependents” form on your profile, enter a name in the name field, then select the appropriate type from the drop down. Once the form is complete, click  to add dependents to the list.

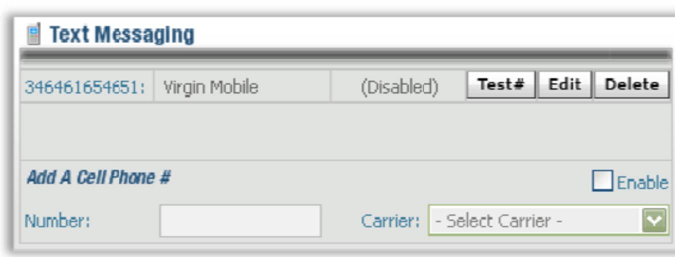
Updating Dependents

To update dependents click  and the information for the dependent will load into the Add a Dependent form. Update the information in the form and click . If you would like to delete the dependent simply click  next to his/her name and the information will be removed from your RallyPoint.

4.1.3 Adding/Updating Contact Information

The contact information should be up to date at all times. Disasters are dynamic, and so are preparedness and recovery plans. Managers broadcast mission critical information to the communication devices you provide. You will notice a “Priority” setting for the Email and Text Messaging fields. Managers will decipher which device(s) the alerts are sent to based on the priority setting. Generally, during an emergency the broadcast will be sent to every device available to ensure a successful delivery.

Adding/Updating Text Messaging



Adding a Cell Phone Number

To add a cell phone number, enter the cell phone number including the area code in the “Number” field. Choose a Carrier from the drop down menu. To receive text messages to the

entered number, select the "Enable" check-box and click Update/Save to add a cell phone number to the list. To test the numbers you enter click Test# and RallyPoint will send a test text message to the number selected.

Updating a Cell Phone Number

To update cell phone numbers click Edit and the information for the cell phone number will load into the "Add a Cell Phone #" form. Update the information in the form and click Update/Save. If you would like to delete the cell phone number, click Delete and the information will be removed from your RallyPoint.

4.1.4 Adding/Updating Email Addresses

Adding an Email Address

To add an email address, locate the "Email Addresses" form. Enter an email address in the "Email Address" field. Enter the required information in the Add an Email form. Add an Email Address and click Update/Save.

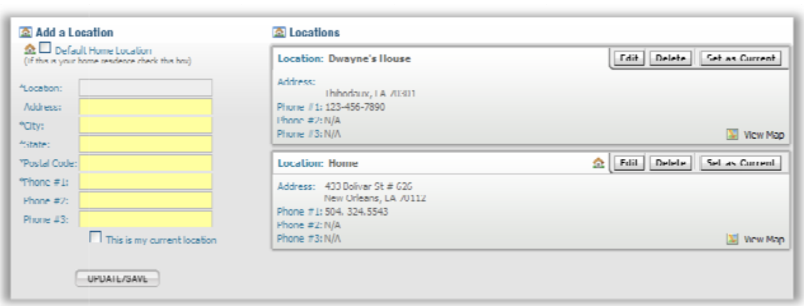
Updating an Email Address

To update an email address click Edit and the information will load into the "Add an Email" form. Update the information in the form and click Update/Save. If you would like to delete the email address, click Delete next to the address and the information will be removed from your RallyPoint.

4.1.5 Adding/Updating Locations

Adding a Location

To add a location, enter the required information in the "Add a Location" form. Once the form is complete, click Update/Save. The information will be added to your profile.



Setting Location as Current

The "Current Location" is your present location when checking in. There are two ways to set your current location.

1) If your current location is a previously added existing location: locate the desired location from the list and click Set as Current A pop-up window will appear reminding you to click "Update/Save". Click "OK" then click Update/Save.

2) If your current location is a location added on the fly, complete the "Add a Location" form, and select the "This is my current location" check-box. Click Update/Save and the location will be added to your profile and set as your current location.

Updating a Location

To update a location, find your desired location from the list, click Edit and the information will appear in the form to the left. Update the information in the form and click Update/Save.

Deleting a Location

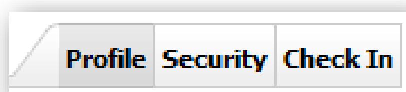
If you would like to delete the location, simply click Delete next to the address. A pop-up window will appear confirming your selection. If you would like to delete the location selected, click "OK", if you would like to cancel your request, click Cancel.

Setting a Default Home Location

There are two ways to set your default home location.

1) If your default location is an existing location: locate the desired location from the list and click Edit. The information will appear in the form to the left. Click the "Default Home Location" check-box and click Update/Save.
2) If your default location is a location added on the fly, complete the "Add a Location" form, and select the "Default Home Location" check-box. Click Update/Save and the location will be added to your profile and set as your default home location.

4.2 Manager Sub-Tabs



The manager sub-tabs are located in the profile by clicking "PROFILE" next to the displayed name in the welcome note. The three tabs are:

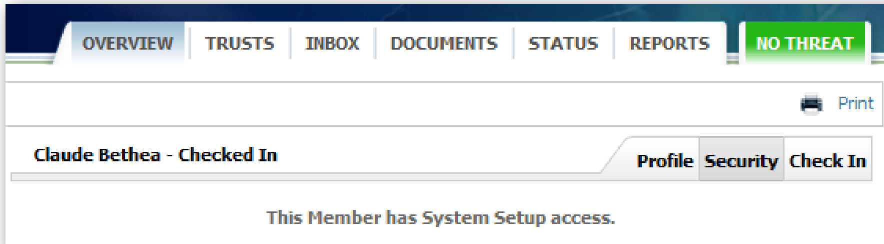
Profile	Click the Profile tab to access the profile.
Security	The Security tab contains the user's access rights within the system
Check In	The Check In section allows the user to access check in forms

4.2.1 Profile

See previous section

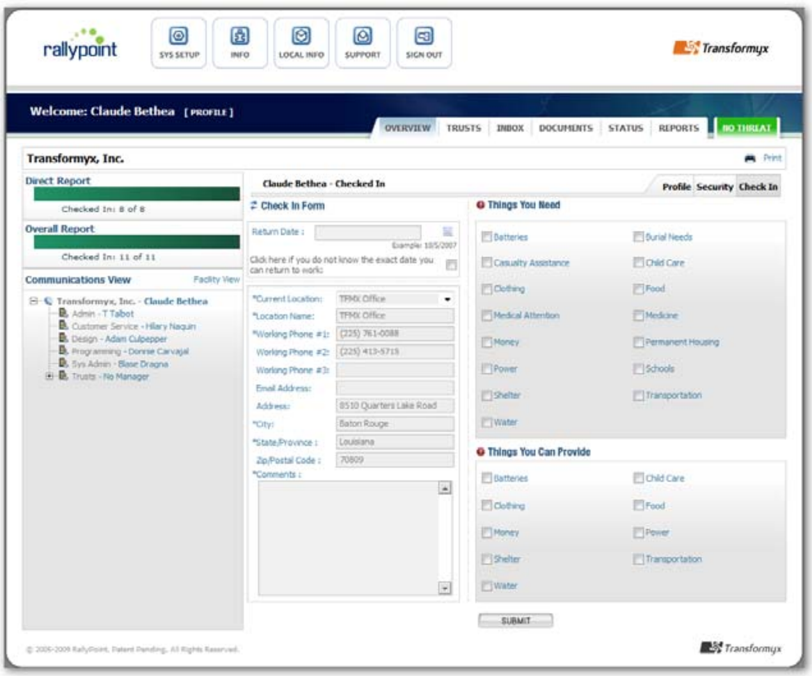
4.2.2 Security

The "Security" Tab contains the member's access rights within the system. Click the tab labeled "Security" to access this section.



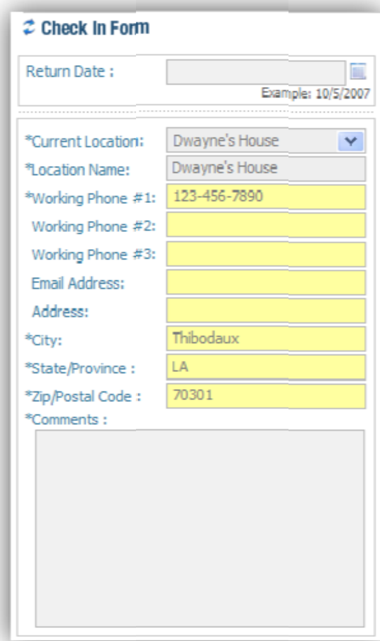
4.2.3 Check In

RallyPoint's check in is based on the current facility status and the interval of that event set by that member's manager or facility manager. This will determine how often the user has to check in to the system. There is a report that will allow managers to view check in intervals to see who complied with check in intervals and who didn't.



How to Check In

By Internet – If you are required to check-in, the first page that will load is the check-in page. If the check in page doesn't load first, you are not required to check in.
To check in to RallyPoint click the CHECK-IN tab in the navigation bar and fill out the Check-In Forms.



Check In Form

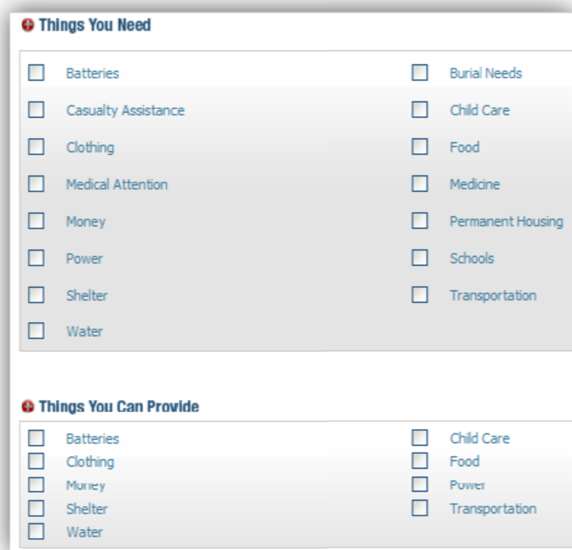
Return Date:	Enter the date you can return to work
Current Location:	From the drop down menu, select your current location from a previously added location or select "Add New Location" to enter a new location on the fly.
Working Phone:	Enter in your currently working phone numbers. (Limited to 3 numbers)
Email Address:	Enter your currently working email address.
Address:	Enter the address at which you are currently located.
Comments:	Type a message for your manager in the comment box.

Check-In Field Descriptions:

Every time you check in to RallyPoint it is stored in your Sent Items section of your Inbox.

Things You Need

In this section, check any of the boxes that apply to you. Filling out this section will generate a report for your manager to view and form a plan that accommodates the needs of his members.

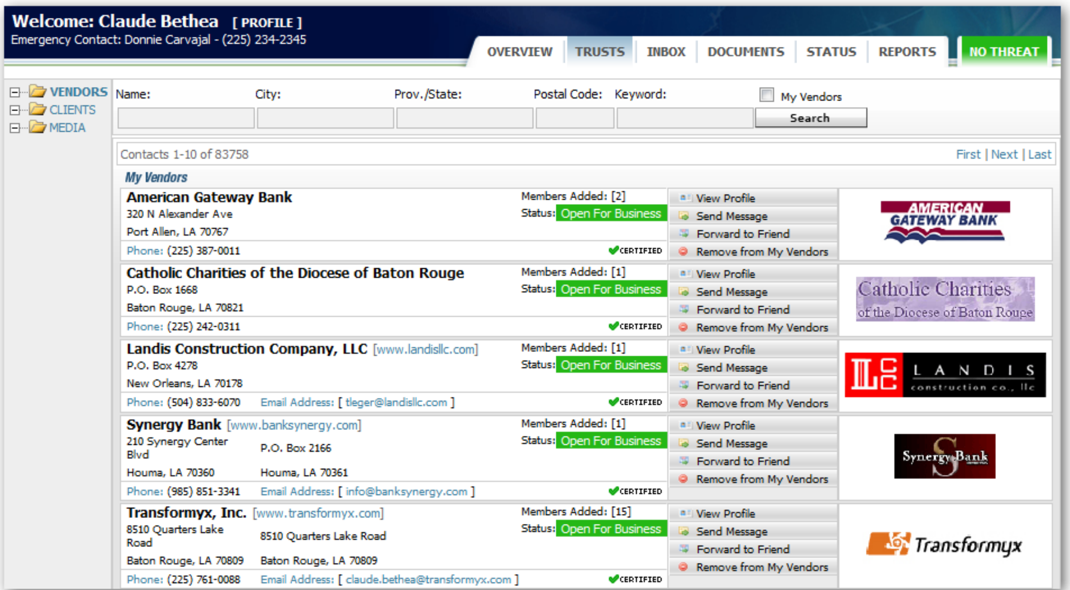


Things You Can Provide

Check any of the boxes that apply to you. Filling out this section will generate a report for your manager. Once the Check-In, Things You Need and Things You Can Provide forms are complete, click Submit. The information you provided will be sent to your manager.

5. TRUSTS

The TRUSTS tab contains the Trusted Communications Server where all of an organization's critical vendors, clients, and key media contacts can be found. Designated RallyPoint managers can establish a trust with their contacts in this section, so as to maintain communications with these key stakeholders in a crisis. This section will demonstrate how to operate the TRUSTS tab.



Adding Contacts

Once the contact is found, they can be added as a trusted vendor by simply clicking ADD TO MY VENDORS in the contact's profile. Remember, only RallyPoint Certified Vendors can be added as contacts.

Updating/Editing Contacts

*Only contacts under the "My Vendors" Section can be edited or updated. A contact must be one of the organization's vendors to edit their contact info.

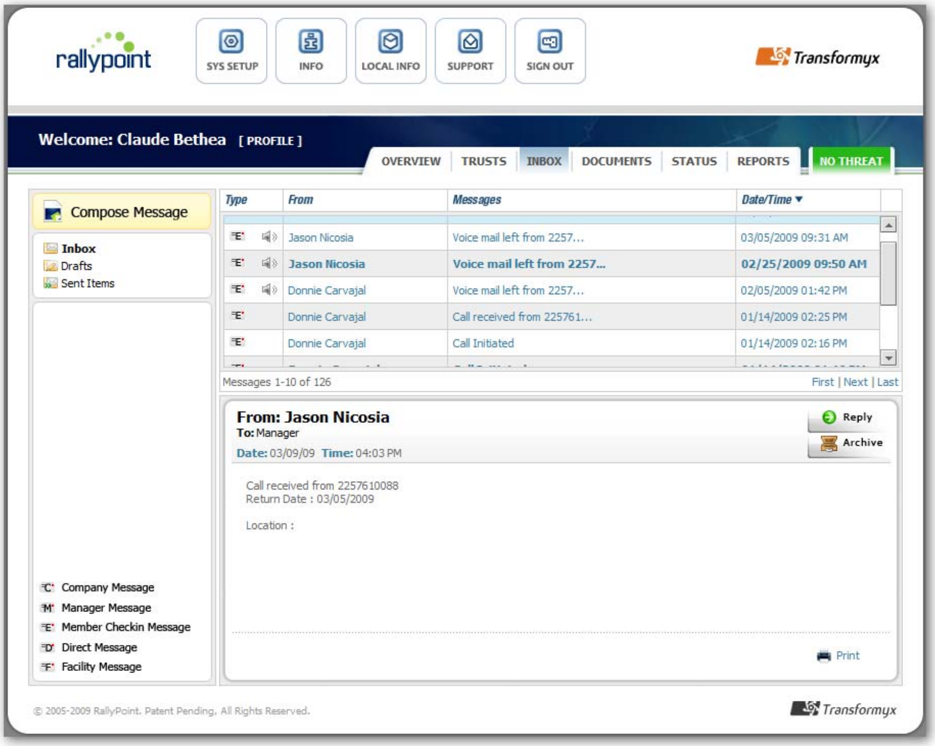
To edit the contact, Click the "VIEW PROFILE" tab listed in the vendor options tab.

If there hasn't already been contacts added for the company, the information section will say "There are no contacts available for this company"

To add/invite contacts, fill out the information at the bottom of the profile and choose the contact type. Click Save/Invite when finished. This will notify that person that they have been added as a contact in the Trusted Communications Server.

6. INBOX

RallyPoint's Inbox is the messaging component. This is where all messages are composed and This allows the user to keep track of all messages as well as keeping track of all messages ever sent. To view all messages click the All Messages link in the messaging navigation bar. To return to the original view simply click the inbox link and the current event messages will reload into the window.



Types of Messages:

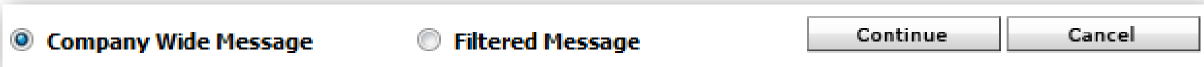
Company Message	Messages sent on behalf of the company to the entire company. These messages are general in nature and come from the highest levels of the company or your corporate communications department.
Manager Message	Messages sent on behalf of your direct manager. These messages come directly from your manager and should be more specific in nature giving everyone in his group specific instructions.
Member Check In Message	Messages sent to managers when a member checks in.
Direct Message	Messages sent from a single individual to another single individual.
Facility Message	Messages sent from a facility manager to everyone in a facility. Generally these messages will convey information on building closures and/or maintenance issues as well as facility evacuations.

6.1 Composing Messages

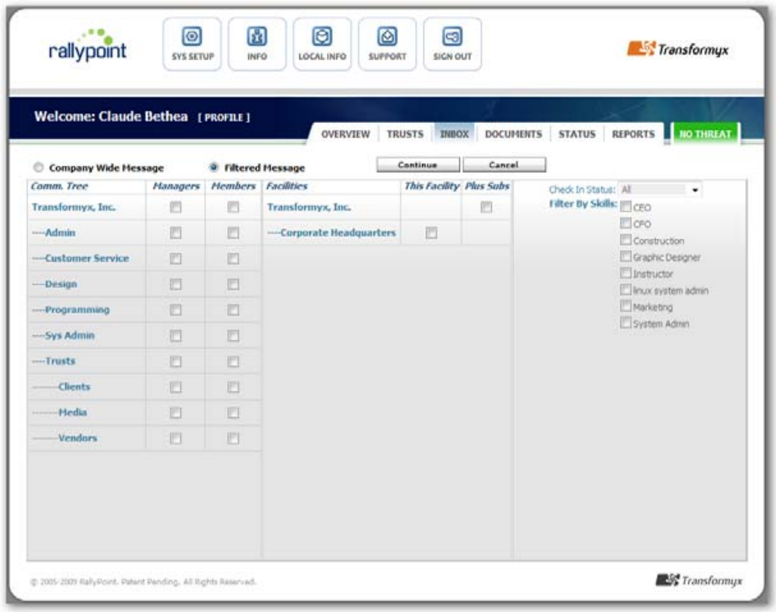
To compose any message, click 

.

Select the type of message you want to send at the top of the folder and click continue.

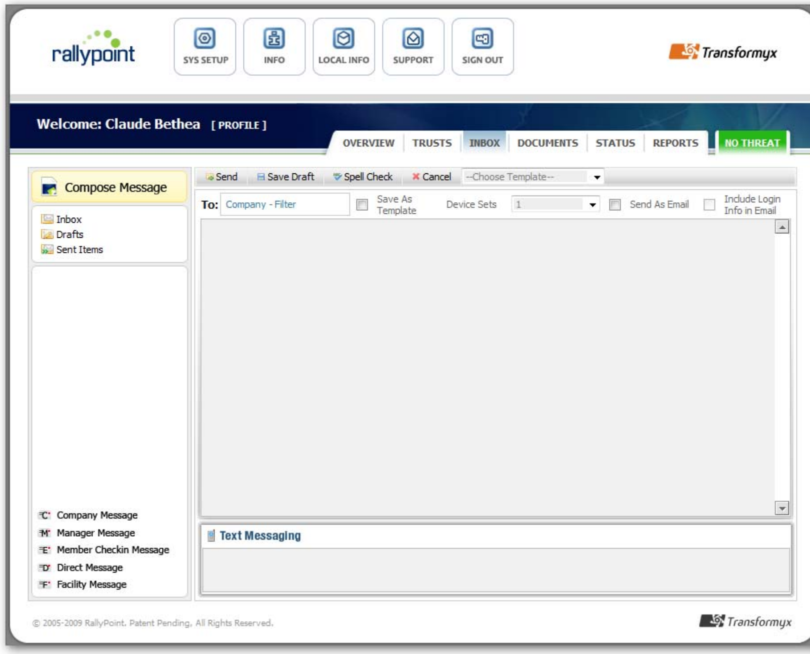


6.1.1 Filtered Message – the "Filtered Message" option allows you to send a message and filter by Communication Tree: Managers, Members or both in each level, Facilities: select facility and or facility plus subs (subs is the sub branches associated with the main branch), Check In Status: All, Not Checked In or Checked In, and by Skills (skills entered into the system by your system administrator).



6.1.2 Company Message The "Company Message" option allows you to broadcast a message to every member in the organization. Sending company messages is only available to those who have company messaging rights set within the system.

Once the message type has been selected, click Continue and the compose message screen will appear.



Compose the message in the main text box section and then decide whether to send the message as an email or text message in addition to sending it as a RallyPoint Message

To send it as an email, click the email box in the top right corner of the screen.

To send it as a text message, type an abbreviated version of the message in the text box at the bottom of the screen.

6.2 Message Drafts

Rather than compose a new message every time it is necessary, drafts can be composed and saved for future use within the system. To create a draft, click the drafts button at the left hand side of the screen at the main message window. Any drafts previously composed and saved will appear here.
To edit and send the draft, click edit.

6.3 Sent Messages

Anytime a message is sent from the current account the message is save in the sent items folder.

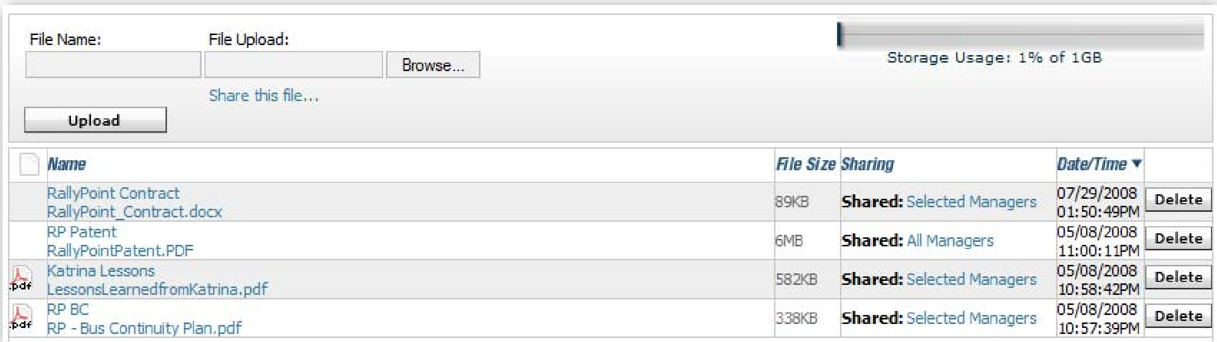
To view these items, click the sent items folder at the left hand side of the screen. Contained in this folder are any messages sent from the user's message center.

Click any of these messages to review their content.

Click print in any of these messages to print them.

7. DOCUMENTS

The documents tab allows managers to upload critical documents and share them with other managers and members in an emergency. Managers can each have up to one gigabyte of memory stored.



	Name	File Size	Sharing	Date/Time	
	RallyPoint Contract RallyPoint_Contract.docx	89KB	**Shared:** Selected Managers	07/29/2008 01:50:49PM	Delete
	RP Patent RallyPointPatent.PDF	6MB	**Shared:** All Managers	05/08/2008 11:00:11PM	Delete
pdf	Katrina Lessons LessonsLearnedfromKatrina.pdf	582KB	**Shared:** Selected Managers	05/08/2008 10:58:42PM	Delete
pdf	RP BC RP - Bus Continuity Plan.pdf	338KB	**Shared:** Selected Managers	05/08/2008 10:57:39PM	Delete

Uploading Documents

To upload a document: Enter the file name in the file name box, and select the file to upload by either typing in the name or browsing for it on the computer.

Once the desired file has been selected, click upload.

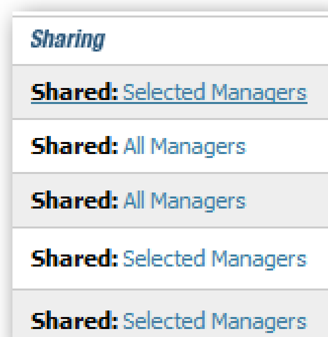
The file should now appear in the files folder with its file size, sharing designation and date/time of upload displayed.

Deleting Documents

To delete a file: Simply click the delete button on the right hand side of that file.

Sharing Documents

Once a file is uploaded, a manager can share that file with other managers or members. To share an uploaded file, Click the button labeled “Share this file” under the sharing tab on the document.



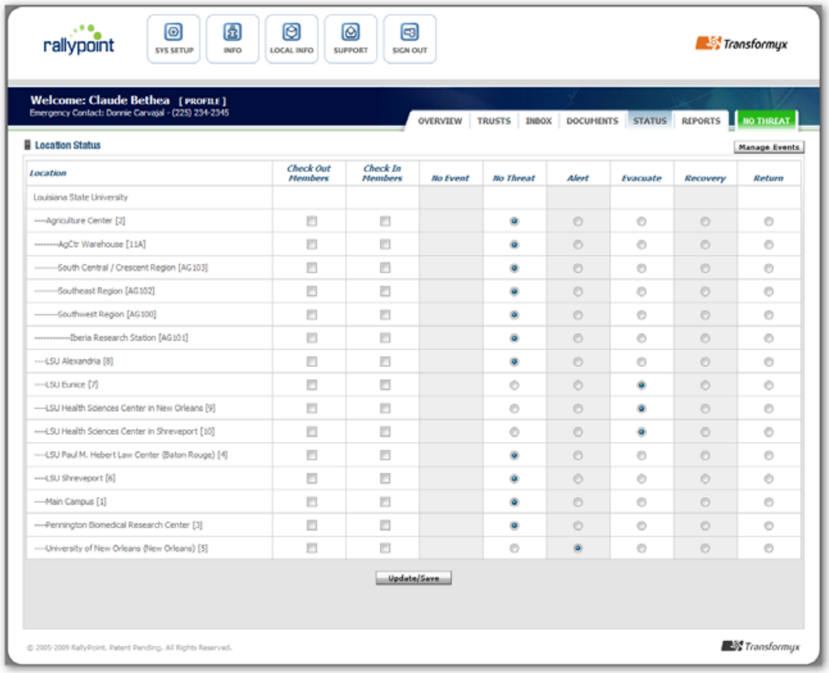
Select the group you would like to share this file with.

Not Shared, Shared with all, Shared with Managers. Click continue once finished.

If sharing with select managers was selected, a drop down menu with the names of all employees with manager rights will appear. Simply select the people the document will be shared with and click continue when finished.

8. STATUS

In this tab, a member with rights can create events, set check in intervals, and update facility statuses.



8.1 Checking Out Members

By clicking on the appropriate check boxes the Facility Manager can "Check Out" all members that belong to that facility.

8.2 Check In Members

By clicking on the appropriate check boxes the Facility Manger can "Check In" all members that belong to that facility.

8.3 Set Facility Status

By clicking on the appropriate radio button the Facility Manger can set the current "Facility Status" that is visible by all management and members for that facility.

Manage Events

Once in the events tab, it is extremely easy to create an event in RallyPoint. To initiate the event:

Choose Event Source- select either natural or custom event. Selecting a Natural event will create another dropdown menu for event type.
Select event type if this occurs

Select the Start date and start time, but it is not required to select an end date or time.

There is also a box to designate this event as a drill. To make the event a drill, check the box.

Fill in the description with text describing the event details.

Click Save/Add to create the event. Clicking reset will erase all the info for that event.

Updating Events - Once an event has been created, it will appear in the main events screen on top of any other events.

To edit or change the event, click the edit button. This will bring up the Event information in the left hand side of the screen and allow a manager to edit and change this info

Click Save/add when finished.

Closing Events - To close the event, Click close event. The event information will then show on the left hand side of the screen.

Click Save/Add to end the event. Once the event has been closed, it will no longer appear in the events list, however the information from this event can be reviewed in the reports section.

Set Check In Intervals

Updating the check in interval designates how often a manager would like their people to check into the system during an event.

To update the check in interval, click the Check in interval tab at the top right of the event.

Select the desired interval. 1 hour, 5 hours, 5 weeks etc.

A reminder should pop up as a reminder to click the save/add button.

Click ok, and then click the save/add button to update and save the check in interval.

9. Reports

RallyPoint's Flex reporting system provides managers with a dash-board for your company status. Each bar represents the number of checked in against the total, as well as percentages on who hasn't checked in and what the current critical needs of the community at large are.

The Reports drop down menu offers several reporting options:

Company Overview	
Interval Check In	
Map	
Member Roster	
Outbound Efficiency	

The manager's communication tree is displaying only his direct reports. View individual status reports by clicking the individual tree levels. Check in status reports of the selected level is displayed to the right of the communication tree.

By rolling over the graph, a light box will appear displaying the check in status.

Send a message directly from the graphs by holding down shift and left click your desired report. A light box will appear with the option to send a message. Once you opt to send a message, another box will appear with several options:

Check In Status Search – the drop down menu gives you the option to message either those members checked in or those not checked. Once the status is chosen, click search and your desired list will appear.

Recipient Selection - Every member of the selected status appears in this list. The "Check All" button allows you to check each member in the list. The "Uncheck All" button clears the selected. By clicking the "Inverse All" button, the selected members will be cleared and those not selected will become selected.

Continue – clicking the "Continue" button, brings you to the message component. Compose the message as a RallyPoint message in the main message box, as a text message in the text messaging box and/or as an email by selecting the "Send as Email" option, then click "Send".

Filter

Once you are in the mapping section of RallyPoint, you can filter employees by skill set. The filter button is located at the top right of the screen, under the toggle option. After clicking the filter button, you will be prompted to choose the desired skill(s) to be mapped. Click continue to view your selection.

To remove the filter, simply select the filter option, deselect the boxes chosen, then click continue. This will give you a refreshed view of the map.

9.1 Company Overview

The main menu of the reports tab is the company overview. This main page shows the company tree, and allows graphical viewing of the number of employees checked in and in what location or department. By drilling down into the graphs, it is possible to see who is checked in and message those that aren't.

9.2 Interval Check In

By clicking the interval Check in option, it is possible to review archived information about check-ins from current and past events. This report will show a manager who met the check in times and who didn't for a specific period of time. This information can also easily be printed.

9.3 Map

By Clicking the Map option, a manager can graphically view their checked in employees and facilities. This interactive reporting system allows the manager to graphically see where his employees, facility status, vendor locations are located as well as search for specific skill sets you may need in an emergency.

The members are displayed on the map in groups. To obtain a more granular view, click the zoom button until the desired magnification is reached. This will break the members up into individual components.

Select a group of people on the map by clicking the selection option then click the starting point and click again on your end point. The selected members will appear in red.

Message the selected members by clicking the "Message Selected" button.

Clear the selection by clicking the "Clear Selected" button.

Toggle the members off the map by clicking the people icon next to the "Toggle" option. Toggle them back on by clicking the people icon again.

Toggle the facilities off the map by clicking the facility icon next to the "Toggle" option. Toggle them back on by clicking the facility icon again.

9.4 Member Roster

The member roster report option displays a list of all members that the manager is responsible for, and information about that individual. This is an easy way find out exactly what number all the members want to be contacted at. This information is also useful in creating distribution lists before and after an event.

9.5 Outbound Efficiency

The outbound efficiency report is a very useful tool to determine whether or not your members have logged into the system and updated their profiles. This report gives the number of members with cell phone numbers and email address in the system against those who do not.